

# Archive Tasks

This feature has been made available in the EHBs as of January 19, 2018.



The **Archive feature** allows you to relocate and archive Tasks and Applications that are no longer relevant.

## Overview

Archiving is a quick option to clear up the 'Not Completed' queue and it allows you to focus on the important Tasks.

The Archive option allows you, the Grantee to relocate and archive Tasks and Applications that are no longer relevant. You or members in your organization that have access privileges can always unarchive these archived Tasks and Applications to continue working on them. The Archive feature allows you to move certain types of Tasks and Applications from the Not Completed tab to the Archived tab. The Status such as In-progress, due-date are preserved, and you can always unarchive to revert back to the previous state.

In general, you can archive Tasks or Applications that you created and have not yet submitted. You cannot archive Tasks that are required as part of your Award compliance.

## Background

Several Grantees have Tasks and Applications in the not completed state that are no longer relevant. For some of these Tasks and Applications, Grantees may no longer have the privileges to work on them and they are cluttering up the 'Not Completed' view. Some of these Tasks are a few years old, and several Applications are past their deadline dates.

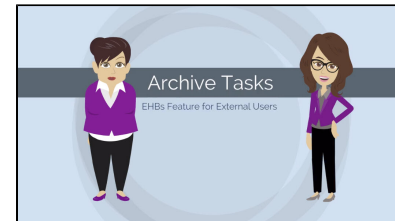
Archiving now allows you to quickly move these Tasks and Applications out of the way to the Archived tab.



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**Click below for Archive Tasks Video!**



## Archive and Unarchive Tasks

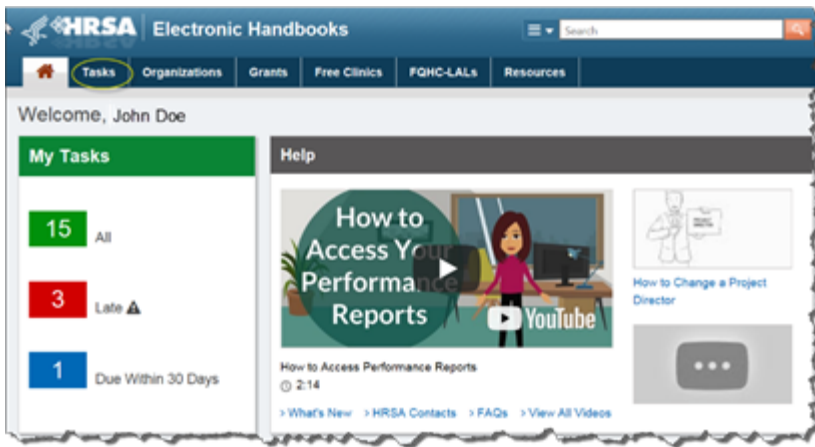
Grantee originated requests that have not been submitted can be archived. Examples, User Access requests, Change in Scope requests. You can archive Tasks with deadlines at any time. For Tasks with deadlines, you can archive them if their deadline is more than 90 days in the past. There are three tabs in the 'Tasks - List' page, the 'Not Completed' the 'Recently Completed' and the 'Archived' tabs. You can only archive Tasks in the 'Not Completed' tab.

### Important Note:

Tasks related to Grant deliverables are required as part of your compliance for an Award. These Tasks cannot be archived as you need to address them and these Tasks will need resolution before the project ends.

## How to Archive a Task

1. Log in to the EHBs.



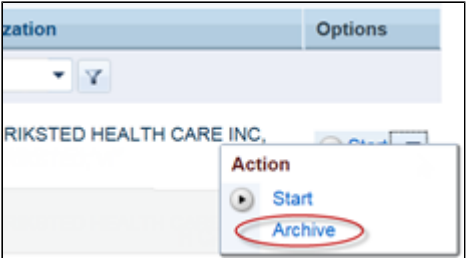
2. Click the Tasks tab at the top of the page. The 'Pending Tasks - List' will open and the

The screenshot shows the 'Pending Tasks - List' page. The page has a navigation bar with 'Tasks', 'Organizations', 'Grants', 'Free Clinics', 'FQHC-LALs', and 'Resources'. The 'Tasks' tab is selected. The main content area is titled 'Pending Tasks - List'. The page shows a table of pending tasks with columns for Deadline (Due), Task Category, Tracking #, Task, Entity, Organization, and Options. The table lists several tasks, including 'Access Request' and 'Prior Approvals', all associated with 'HEAL WELL COMMUNITY CENTER'.

Deadline (Due)	Task Category	Tracking #	Task	Entity	Organization	Options
N/A	Access Request		Access Grant Request	H93HA00701 (Grant)	HEAL WELL COMMUNITY CENTER	Start
N/A	Access Request		Access Grant Request	H81CS00567 (Grant)	HEAL WELL COMMUNITY CENTER	Start
N/A	Prior Approvals	PA-00047198	Prior Approvals	C81CS01234 (Grant)	HEAL WELL COMMUNITY CENTER	Edit
N/A	Prior Approvals	PA-00038210	Prior Approvals	C81CS01234 (Grant)	HEAL WELL COMMUNITY CENTER	Edit
N/A	Access Request		Access Grant Request	C81CS01234 (Grant)	HEAL WELL COMMUNITY CENTER	Start
N/A	Access Request		Access Grant Request	H81CS00567 (Grant)	HEAL WELL COMMUNITY CENTER	Start

contents of the 'Not Completed' tab will be displayed.

3. In the 'Not Completed' tab, list view, locate a Task you want to archive, an



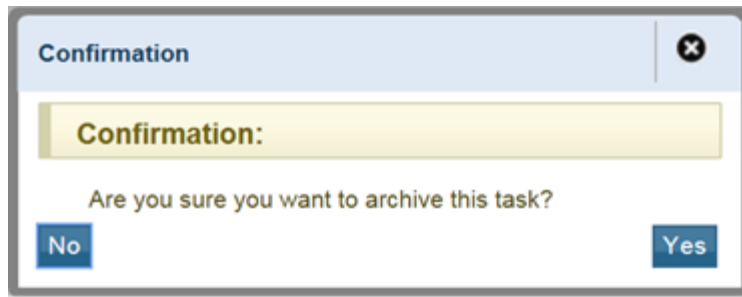
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4.

Confirm that you want to archive this Task.



5.

You will see a success message and the Task will be moved to the 'Archived' tab.



## Pending Tasks - List



**Success:**

Task has been archived.

6

If you select the Archived tab, you should see your archived Task.

**Archived Tasks - List**

Typically, you can archive and unarchive certain unsubmitted Pending Tasks such as Prior Approvals. Click here for an overview [\(+ View More\)](#)

Not Completed Recently Completed **Archived**

Detailed View | Search | Saved Searches

Page size: 15 Go 2 items in 1 page(s)

Archived Date	Deadline (Due)	Task Category	Tracking #	Task	Entity	Organization	Archived By	Options
12/8/2017 2:02:46 PM	N/A	Access Request		Access Financial Request	P06HA2905 (Grant)	HEALTH CARE INC,	Slocomb, Corrine	Unarchive

## How to Unarchive a Task

1.

Next, navigate to the 'Archived' tab. Notice that the Archived

**Archived Tasks - List**

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Not Completed Recently Completed **Archived**

Detailed View | Search | Saved Searches

Page size: 15 Go 2 items in 1 page(s)

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2.

Locate the Task you want to unarchive, and select **Unarchive** from the Options column.

3.

Confirm that you want to unarchive the Task.

4.

You will see a success message and the Task is moved back to the 'Not Complete' tab. Now you can continue to work on it!



### Archived Tasks - List



#### Success:

Task has been unarchived.


## Archive and Unarchive Applications

Archiving of Applications is similar to Archiving of Pending Tasks. Several Applicants have open Applications that are past due and can no longer be submitted by HRSA staff. The Archive Applications feature allows you to move Applications that are more than 90 days past their due date to the Archived tab. You can then review or continue working on them.

**Important Note:**

Only Applications that are past due by more than 90 days can be archived. Un-submitted Applications that originate within EHBs can be deleted while Grants.gov cannot be deleted. Users who created the Application, and those that have Edit, and Submit privileges to that Application can archive it.

## How to Archive Applications

1.	Log in to the EHBs.	
2.	Hover over the Tasks tab at the top of the page, and select 'Grant Applications'	

from the overlay. The view will now display Grant Application, **Not Completed**, tab.

3.

Locate the Application that is past due by more than 90 days.

ALL TASKS

All Entities

Tasks

Pending Tasks

Archived Tasks

Grants

Requests

Health Center CIS

Requests

Grant Applications

Prior Approvals

Submissions

Submissions

User Access Requests

Review Requests

Applications - Incomplete List

Grants.gov Applications Pending Validation: 0

Not Completed Recently Completed Archived All

Export To Excel


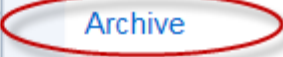


Page size: 15 Go

Due	Application Deadline	Announcement #	EHBs Tracking #	Grants.Gov Tracking #	Project Title
All					
Due: Late (2)					
▶ 128 Days	08/02/2017	HRSA-17-118	149917	N/A	Fiscal Year 2017 Mental Health and Services (AIMS) S
▶ 66 Days	10/03/2017	HRSA-18-023	150548	GRANT12461944	Service Area Co

Page size: 15 Go

4.

From the Options column, select Archive and confirm your action.

	Status	Options
<div>▼ Y All ▼ Y</div>		
SOCIATION West Virginia	In Progress	<div><b>Action</b><ul style="list-style-type: none"><li>Manage Peer Access</li><li> Delete</li><li> Archive</li></ul><b>View</b><ul style="list-style-type: none"><li>Application </li><li>Announcement </li></ul></div>
SOCIATION West Virginia	In Progress	



4.

You will see a success message and the Application is moved to the 'Archived' tab.



## Applications - Incomplete List



### Success:

Application has been archived.

5

Select the Archived tab. The Application on your archive will be listed here.

**Applications - Archived List**

Grants.gov Applications Pending Validation: 0

Not Completed Recently Completed **Archived** All

[Collapse Group](#) | [Detailed View](#) | [Search](#) | [Saved Searches](#)

Page size: 15 Go 1 items in 1 page(s)

	Due	Application Deadline	Announcement #	EBBs Tracking #	Grants.gov Tracking #	Project Title	Organization	Status	Options
Due: Late (1)									
	128 Days	08/02/2017	HRSA-17-118	149917	N/A	Fiscal Year 2017 Access Increases in Mental Health and Substance Abuse Services (AAMS) Supplemental Funding	HEALTH CENTERS, INC, West Virginia	Archived	<a href="#">Unarchive</a>

Page size: 15 Go 1 items in 1 page(s)

## How to Unarchive Applications

1.

In the Grant Application, Archived data, locate the Application you want to unarchive.

2.

Select 'Unarchive' from the Options menu and confirm your action.

3.

You will see a success message and the Application



### Applications - Archived List



**Success:**

Application has been unarchived.

ion will be unavailable  
his video and moved  
back to the Application  
s, ' **Not Completed**  
table.